



COMMONWEALTH of VIRGINIA

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August 17, 2004

MEMORANDUM

TO: Agency Human Resource Directors

FROM: E. Steve Hastey, Jr.
Performance Management Systems Analyst

SUBJECT: Performance Management Evaluation Implementation

The following information is provided for implementation of the calendar year 2004 Performance Management cycle. Please refer to memorandum "Fiscal Year 2005 Authorizations and Compensation Activities", dated July 20, 2004, from Rick Pugh for policy guidance.

1) Begin Evaluation Rating Entry

Agencies may begin entering ratings into the Performance Management database beginning September 16, 2004 by using the Rating Evaluation Entry/Update PSI000 transaction. To view records, you may scroll through all employees in your agency with the PSI306 transaction, or view an individual employee's record by using the PSI305 transaction. For transaction guidance, please refer to PMIS Manual Volume 1 (Chapter 3-9.1), accessible via the DHRM ITech Web site at <http://web1.dhrm.state.va.us/itech/>.

Enter ratings only for the October 25, 2003 through October 24, 2004 Performance Management cycle. Old evaluations must not be entered into the 2004 Performance Management (PM) database. No performance increases can be granted to employees who are not rated. Evaluation ratings entered in this Performance Management cycle will also provide the basis for establishing employees' eligibility for future management-initiated pay practices. Therefore, it is essential that all eligible employees be rated.

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2) Performance Increases

The statewide (SW) and northern Virginia (FP) Pay Band salary ranges will increase automatically by 3.0% effective November 25, 2004. If applicable, the new Alternate Pay Band maximum will be used to determine over-maximum salaries. Other than sworn officers of the Department of State Police, qualified employees whose salaries are at or above the new (November 25, 2004) Pay Band maximums will receive a lump sum performance payment equal to 3.0% of their salary in lieu of a base salary 3.0% increase (use Special Pay 24 to apply lump sum payments to CIPPS). Qualified sworn officers of the Department of State Police will receive a \$1,491 uniform base salary increase in lieu of the 3.0% increase that other qualified employees will receive on November 25, 2004.

All classified employees (formerly graded or ungraded, including academic teachers) and non-classified employees (agency heads and role code 90000+ whether or not their former classes were assigned to salary grades) are eligible to be rated except for non-working employees on long-term disability. Faculty will not be included in the Performance Management database; however, ITech will apply faculty base salary increases to PMIS via file input, upon request.

To qualify for a performance increase, eligible employees:

- Must have a Performance Increase (PI) Eligibility date of 11/25/2004
- Must be rated "Contributor" or "Extraordinary Contributor"
- Cannot be in a Leave-Without-Pay status (Except as noted in paragraph 8 below)

ITech will apply the salary increases to PMIS on November 25, 2004 and this will enable an automatic update of the non-faculty salaries on the Department of Accounts payroll system (CIPPS).

3) Valid Rating Codes

Valid ratings for entry into the Performance Management database are:

- X: Extraordinary Contributor
- C: Contributor
- B: Below Contributor
- L: *Leave, or otherwise Not Rated – no increase will be applied if rated "L"*

Agencies with internal procedures that assign more than three rating categories must conform their rating schemes to the rating categories listed above when entering them into the Performance Management database.

If desired, you may enter an "L" to indicate that the performance evaluation has not been completed, for example, when an employee goes on leave before an evaluation is conducted. Ratings may be corrected by overriding the previous entry, with this exception: "L" may be overridden with "X", "C", or "B", but once a rating evaluation ("X", "C" or "B") is entered and the transaction is accepted, you must notify DHRM ITech to change the rating to "L".

The agency/position numbers of the supervisor and reviewer will be captured to identify the rated employee's supervisor and reviewer. If available on PMIS, the PMIS Supervisor's Agency and Position Number fields will be utilized to pre-populate supervisor and reviewer evaluation rating entry fields, so this data may be pre-filled on the screen. If the pre-filled numbers are not correct, you may key over the displayed numbers with different agency/position numbers, as required. Where they are not pre-filled, enter the correct agency/position numbers. In either case, **please verify the supervisor and reviewer agency/position numbers before entering the transaction.** (Enter zeros for the agency number, and spaces or any position number, to identify a non-PMIS supervisor and/or reviewer.)

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4) Ratings Entry Deadline

Please enter all evaluation ratings into the system by November 19, 2004. Requests for deadline extensions and Performance Management policy questions can be directed to Robert Weaver, Senior Compensation Consultant, (804) 225-2251 or e-mail to bob.weaver@dhrm.virginia.gov.

ITech will update PMIS on November 25, 2004 and will produce P3's during the PMIS update. **For rated employees**, we also will automatically advance the Performance Increase (PI) Eligibility date from November 25, 2004 to November 25, 2005. PMIS access will not be available November 25.

5) Suspense Processing

All pending transactions with an effective date of November 25, 2004 will be processed before the performance increases are applied. **Employee records having pending transactions with effective dates greater than November 25, 2004 will be updated, but DHRM will delete conflicting compensation suspense actions, e.g. promotions.** Agencies will be notified of deleted pending actions and advised to reenter these after the Thanksgiving holiday weekend.

6) Initial Reports

Performance evaluation reports will be produced and stored in the Human Resource Management (HuRMan) agency folders, in a sub-folder named PMP2004, accessible via the DHRM ITech Web site at <http://web1.dhrm.state.va.us/itech/>. Reports will be split by agency number and stored in the corresponding HuRMan agency folder, (e.g., reports for agency 703 will be stored in sub-folder PMP2004 of agency folder 00703). Registration is required to gain access to agency folders. Registration is also accomplished via the DHRM ITech Web site. Agencies entering evaluation ratings for other agencies may need to request access to additional agency folders.

- "Load Listing" - PM9495. Provides a listing of employees with a Performance Increase (PI) Eligibility date of 11/25/2004. Only employees with this date will be loaded to the Performance Management database. Ratings can be entered only for employees listed on the latest copy of this report. This report will be available September 16, 2004 in the PMP2004 sub-folder of your agency HuRMan folder.
- "Performance Increase (PI) Eligibility Dates Not 11/25/2004" - PM9970 report. This report will be available beginning September 16, 2004 in the PMP2004 sub-folder of your agency HuRMan folder. A rating cannot be entered until an employee's PI Eligibility date is 11/25/2004. If you receive a copy of this report, the listed employees' records should be investigated as to the reason for their PI Eligibility dates, and if appropriate, brought up-to-date by submitting a P3 to DHRM's Office of Agency Human Resource Services. The Performance Management database will not reflect the updated eligibility date until we perform a reload of the PM database.

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7) Projected PM Database Reload Reports Availability Dates

September 16, 2004	(PMIS status effective 09/15)
October 4	(PMIS status effective 09/30)
October 18	(PMIS status effective 10/15)
November 2	(PMIS status effective 10/31)
November 16	(PMIS status effective 11/15)
November 22	(PMIS status effective 11/20)

An Agency Quick Reference card outlining important performance evaluation dates, reports descriptions, and transactions is attached for your convenience. In order to reduce costs, we no longer mail copies of this memorandum or the attached card. You are encouraged to print the card on colored cover stock paper for easy reference.

8) Active Military Supplement Increase

ITech will increase Active Military Supplements on November 25, 2004 for employees on LWOP-Military who are rated "Contributor" or "Extraordinary Contributor." The Temporary Pay field contains the semi-monthly Active Military Supplement when the employee's leave-code is equal to "05", LWOP-Military.

CIPPS agencies that have established the Active Military Supplement as an automatic special pay will use Special Pay number 44 on H10AS to increase the amount in CIPPS.

Please direct P3 requests, questions or problems regarding the Performance Management Evaluation technical implementation to the DHRM Help Desk via <http://web1.dhrm.state.va.us/itech/> (Help Desk tab at top of web page).

Attachment

cc: Sara Redding Wilson, Director, DHRM
Rick Pugh, State Compensation Director, DHRM
Belchior Mira, Director, Office of Information Technology (ITech), DHRM